

Grain Transportation Quarterly Updates

Transportation and Marketing Programs
Transportation Services Division
www.ams.usda.gov/AgTransportation

Truck Advisory

Table 1: U.S. Grain Truck Market, 2nd Quarter 2011

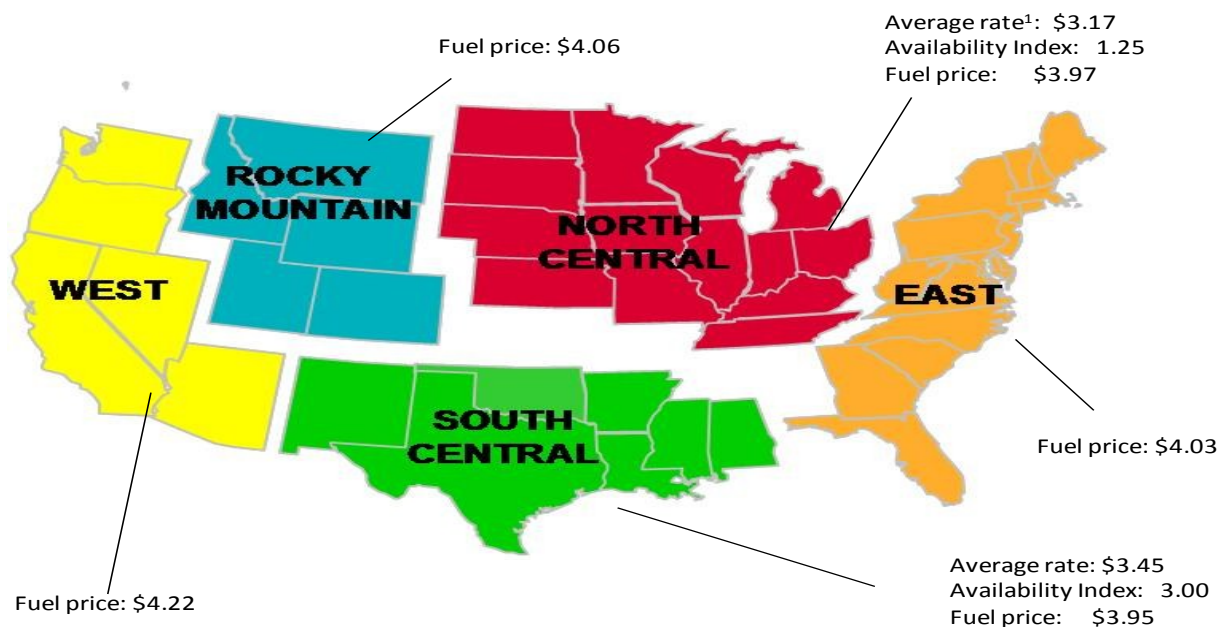
Region	25 miles	100 miles	200 miles	Truck availability	Truck usage	Future truck usage
	¹ Rate per mile, per truckload			<i>Quarterly Index</i>		
				1=Very Easy to 5=Very Difficult	1=Much Lower to 5=Much Higher	
National average²	4.25	3.07	2.77	1.60	2.80	3.00
North Central region	3.87	2.83	2.82	1.25	2.50	2.90
Rocky Mountain	n/a	n/a	n/a	n/a	n/a	n/a
South Central	4.37	3.21	2.77	3.00	3.10	2.50
West	n/a	n/a	n/a	n/a	n/a	n/a

¹Rates are based on trucks with 80,000 lb gross vehicle weight limit, and are quoted in U.S. dollar

²National average is based on rates received from various States, but not every State is represented.

Source: Transportation and Marketing Programs/AMS/USDA

Figure 1: U.S. Grain Truck Market, 2nd Quarter 2011



Note: Fuel prices are a quarterly average (unit per gallon)

Fuel Price Data Source: Energy Information Administration U.S. Department of Energy, www.eia.doe.gov

Truck Usage

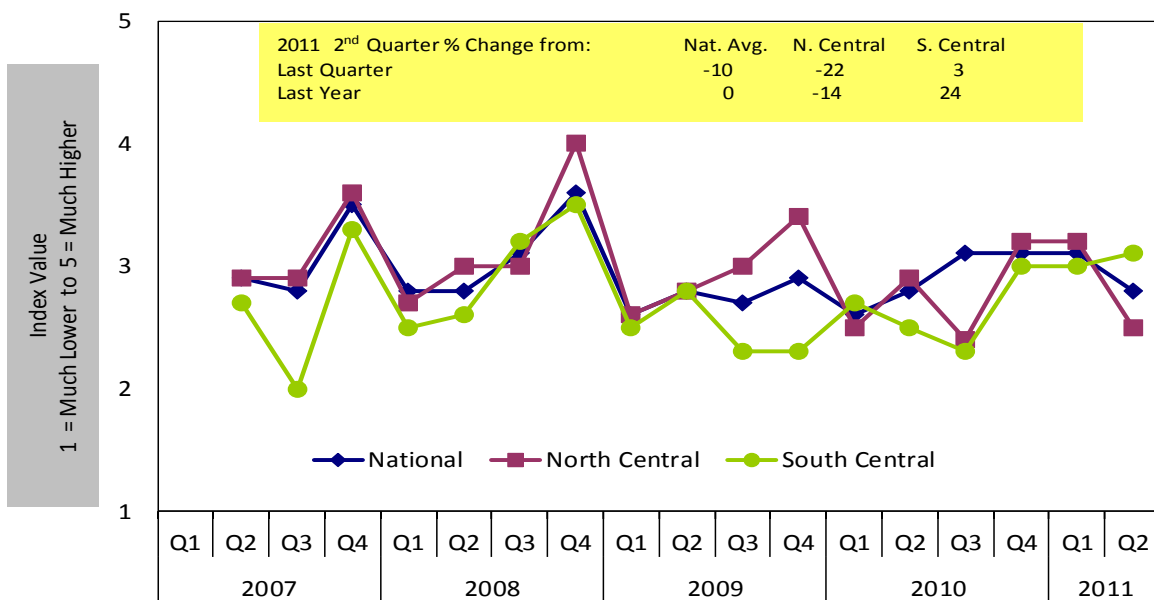
Table 2: Regional Truck Usage Index

Current Truck Usage 1 = Much Lower to 5 = Much Higher					Future Truck Usage 1 = Much Lower to 5 = Much Higher			
2009	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
National	2.60	2.80	2.70	2.90	2.70	2.70	2.70	2.80
North Central	2.60	2.80	3.00	3.40	2.80	2.80	2.90	2.80
Rocky Mountain	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
South Central	2.50	2.80	2.30	2.30	2.50	2.50	2.30	2.80
West	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2010	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
National	2.60	2.80	3.10	3.10	2.60	2.80	3.70	3.10
North Central	2.50	2.90	2.40	3.20	2.70	3.00	3.60	2.80
Rocky Mountain	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
South Central	2.70	2.50	2.30	3.00	2.30	2.00	4.00	3.30
West	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2011	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
National	3.10	2.80			3.10	3.00		
North Central	3.20	2.50			2.80	2.90		
Rocky Mountain	n/a	n/a			n/a	n/a		
South Central	3.00	3.10			3.30	2.50		
West	n/a	n/a			n/a	n/a		

n/a: not data available

The truck usage index tracks the trends of truck utilization at grain elevators

Figure 2: National Truck Usage, 2nd Quarter 2011



Source: Transportation and Marketing Programs, AMS/USDA

No data available for 1st quarter 2007

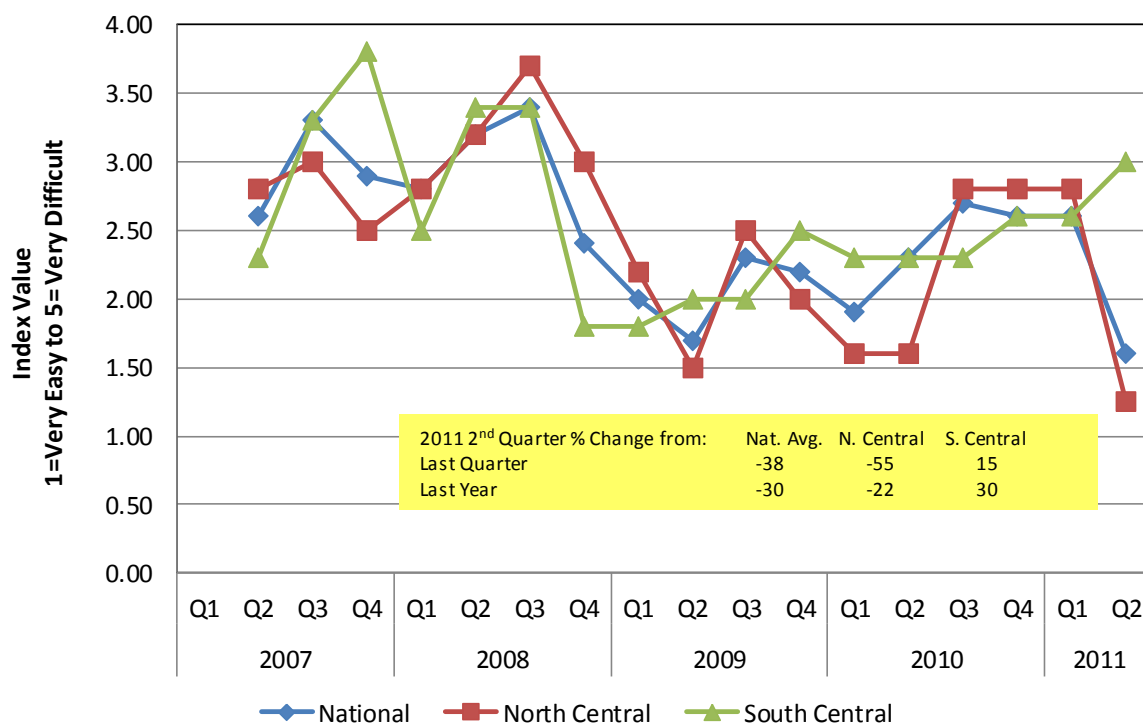
Truck Availability

Table 3: Quarterly National Truck Availability Index

Region	1= Very Easy	5=Very Difficult		Current qtr as % change from	
	2 nd Quarter 2011	Previous Quarter	Same Quarter Last Year	Previous Qtr	Same Qtr Last Year
National	1.6	2.6	2.3	-38%	-30%
North Central	1.3	2.8	1.6	-55%	-22%
South Central	3.0	2.6	2.3	15%	30%

The truck availability index tracks the trends in perceived ease of hiring a truck as reported by grain elevators.

Figure 3: National Truck Availability



No data available for 1st quarter 2007

Truck Rates

Table 4 : Average Grain Truck Rates for Short and Long Hauls, 2nd Quarter 2011 (\$/mile per truckload)

Region	25 miles	100 miles	200 miles	% increase from:					
				Last qtr			Same qtr Last year		
				25 mi	100 mi	200 mi	25 mi	100 mi	200 mi
National Average	\$4.25	\$3.07	\$2.77	7%	5%	10%	0%	27%	19%
North Central	\$3.87	\$2.83	\$2.82	11%	0%	15%	-8%	31%	34%
Rocky Mountain	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
South Central	\$4.37	\$3.21	\$2.77	14%	10%	10%	-1%	22%	25%
West	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

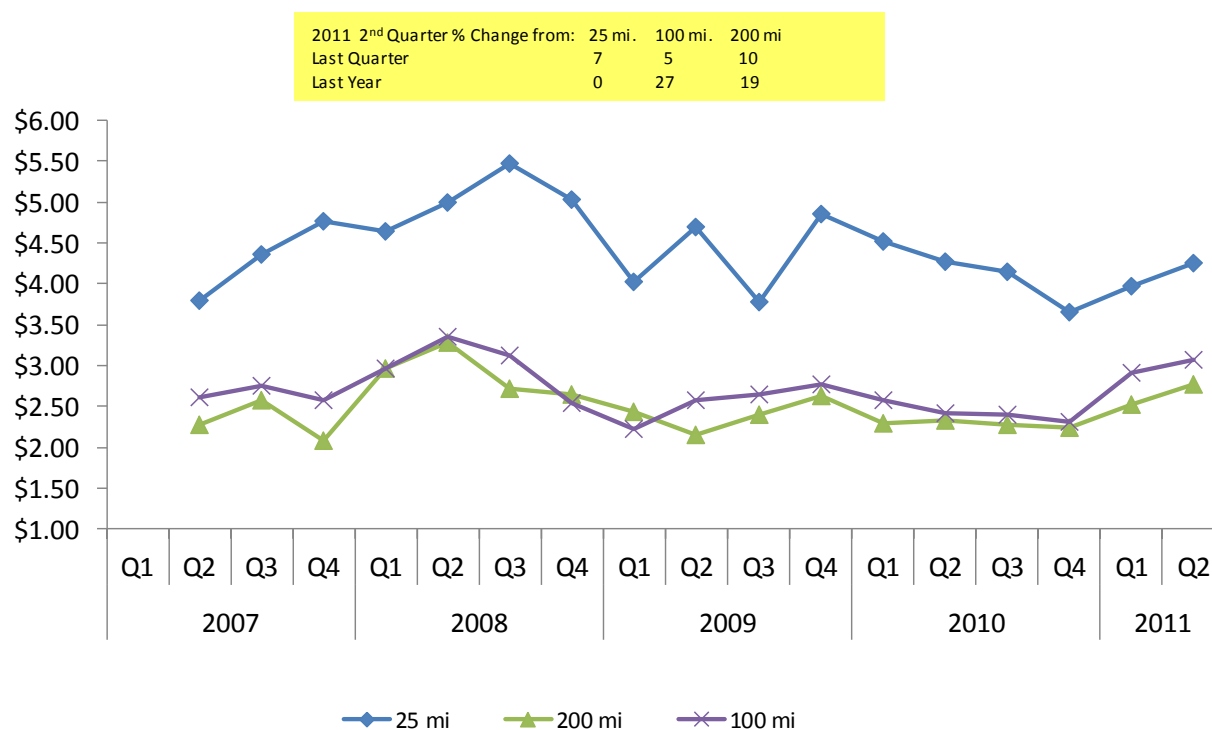
n/a: data not available

Rates are based on trucks with 80,000 lbs gross vehicle weight limit

Source: Transportation and Marketing Programs/AMS/USDA

A truck is assumed to carry 55,000 lbs or 25 metric tons of grain. Rates per metric ton per mile can be calculated from rates per truckload.

Figure 4: National Average Truck Rates by Trip Distance

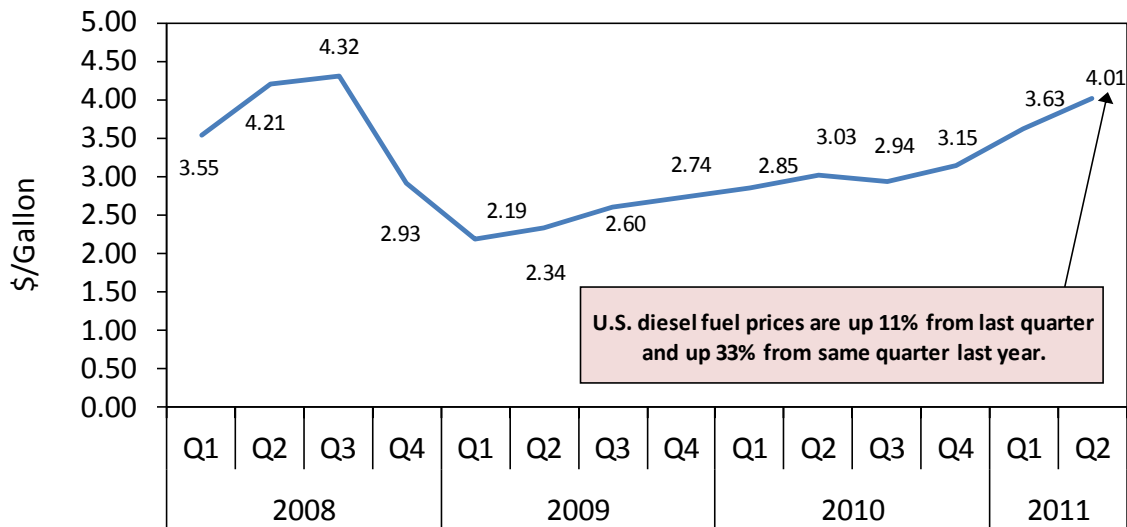


No data available for 1st quarter 2007

U.S. Diesel Fuel Prices

The **diesel fuel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for grain movements.

Figure 5: U.S. Average On-Highway Diesel Fuel Prices



Source: Energy Information Administration/U.S. Department of Energy

Table 5: 2nd Quarter 2011 Average Diesel Fuel Prices (All Types - \$/Gallon)

Location	Price	Change From	
		Last Quarter	Same Qtr Last Year
East Coast	4.03	3.67	0.99
New England	4.15	3.78	1.07
Central Atlantic	4.15	3.76	0.99
Lower Atlantic	3.97	3.59	0.98
Midwest	3.97	3.58	0.97
Gulf Coast	3.95	3.57	0.97
Rocky Mountain	4.06	3.61	0.98
West Coast	4.22	3.77	1.07
California	4.33	3.83	1.16
U.S.	4.01	3.63	0.98

Source: Energy Information Administration/U.S. Department of Energy

Ocean Rates

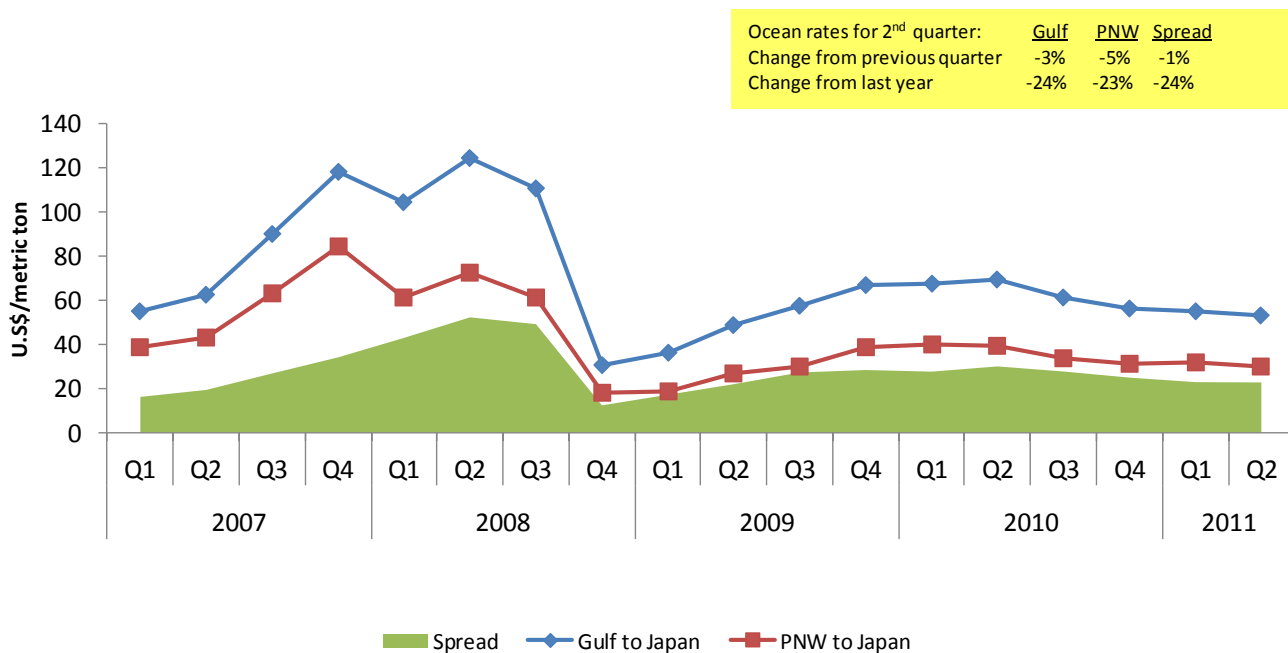
Table 6: Ocean Shipping Rates for Bulk Grain (\$/metric ton)

Gulf to										
Country	1 st Qtr 2010	2 nd Qtr 2010	3 rd Qtr 2010	4 th Qtr 2010	Average	1 st Qtr 2011	2 nd Qtr 2011	3 rd Qtr 2011	4 th Qtr 2011	Average
Japan	67.29	69.36	61.45	56.25	63.59	54.79	52.97			53.88
Rotterdam	24.92	27.87	28.31	24.84	26.49	23.13	21.52			22.33
China	65.54	67.71	60.33	55.46	62.26	53.79	51.58			52.69
Mexico	20.75	22.34	21.64	19.83	21.14	18.75	18.86			18.81
Colombia: Atlantic Port (East)	25.83	24.99	24.50	22.33	24.41	22.13	22.78			22.46
Colombia: Pacific Ports (West)	37.75	36.91	35.41	31.31	35.35	29.58	32.03			30.81

PNW to										
Country	1 st Qtr 2010	2 nd Qtr 2010	3 rd Qtr 2010	4 th Qtr 2010	Average	1 st Qtr 2011	2 nd Qtr 2011	3 rd Qtr 2011	4 th Qtr 2011	Average
Japan	39.67	39.38	33.77	31.34	36.04	31.92	30.24			31.08
China	-	-	-	29.25	29.25	30.92	28.88			29.90

Source: O'Neil Commodity Consulting

Figure 6: Grain Vessel Rates and Spread, U.S. to Japan



Source: Drewry Shipping Consultants/O'Neil Commodity Consulting

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